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HEALTHCARE

DIGITAL MARKETING TRENDS

SURVEY

2021

Chart a Path to Digital Marketing Success

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Advisory Board

A special thank you to our Advisory Board. These thought leaders helped us ensure this survey focused on the areas that matter to healthcare marketers.

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Join the Advisory Board!

Share your ideas and insights by joining our survey Advisory Board! Email hello@geonetric.com and we'll reach out when planning for the next survey gets underway.

Executive Summary

It's been an unusual year...

In part, it's been an unusual year because we're still wrestling with the pandemic and its side effects within the healthcare industry — constant crisis mode, bans on elective procedures, cancellations for any number of reasons, including the lack of beds.

It's also been an unusual year because, although it's felt a bit like the movie Groundhog Day, reliving the same day repeatedly, the reality is that the world around us has been on fast forward. Consumerism trends like online ordering, curbside and home delivery, streaming video and videoconferencing, real-time order tracking, and immediate satisfaction have all rocketed ahead in a short amount of time. And, like last year, we see healthcare playing catch-up in this year's results.

Dethroning the content king

Every year I am asked for insight into what makes healthcare digital leaders more successful than their counterparts. For the past few years, the answer has been content. Sure, leaders are faster to adopt new approaches and technologies like marketing automation, CRM and personalization, but those tools are hard to execute if you don't have a scalable production engine delivering consistently engaging content.

While content is still essential, this year we're seeing a new theme emerge: digital strategy.

Digital strategy for the win

Digital strategy has not been a perennial area of strength in healthcare. Even this year, when we asked agency and vendor partners where they feel healthcare is furthest behind other industries, digital strategy topped their lists.

However, it's an area that's getting a lot of attention right now, particularly amongst digital leaders, with the promise to continue growing capacity in this discipline. Consider this year's findings:

- Digital strategy is the second-highest area where leaders outperformed everyone else, edged out only by content marketing
- Leaders scored their digital strategy capabilities almost two full points higher on a -2 to +2 scale
- Digital strategy is the number one top job for 2021 and 2022 — with the majority of respondents indicating this is where they want to hire additional staff in the coming year

Digital strategy at the heart of the redesigned healthcare experience

It's not surprising the last 18 months forced many healthcare organizations to rethink all the touchpoints of an encounter. So many of the operational elements that seemed so set in stone just two short years ago evolved almost overnight. The answers arrived at during the heat of the moment weren't perfect, but organizations can continue to iterate because they're also not going back to where they started. Healthcare marketers are facing a new set of challenges never seen before — challenges that can only be solved with new thinking. This means all healthcare organizations — from leaders to average to laggards — are working with internal stakeholders to figure out where they go from here. And the only path forward involves digital strategy.

Here's to business as unusual.

Ben Dillon, MBA
Chief Strategy Officer

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Using the Data

Comparing your organization to an average of the industry as a whole doesn't tell a complete story. That's why we segment the data by organizations that are ahead of the competition and those that are falling behind. It's not enough to understand what "everyone" is doing. The goal is to identify the investments and tactics of organizations that are finding success in digital marketing.

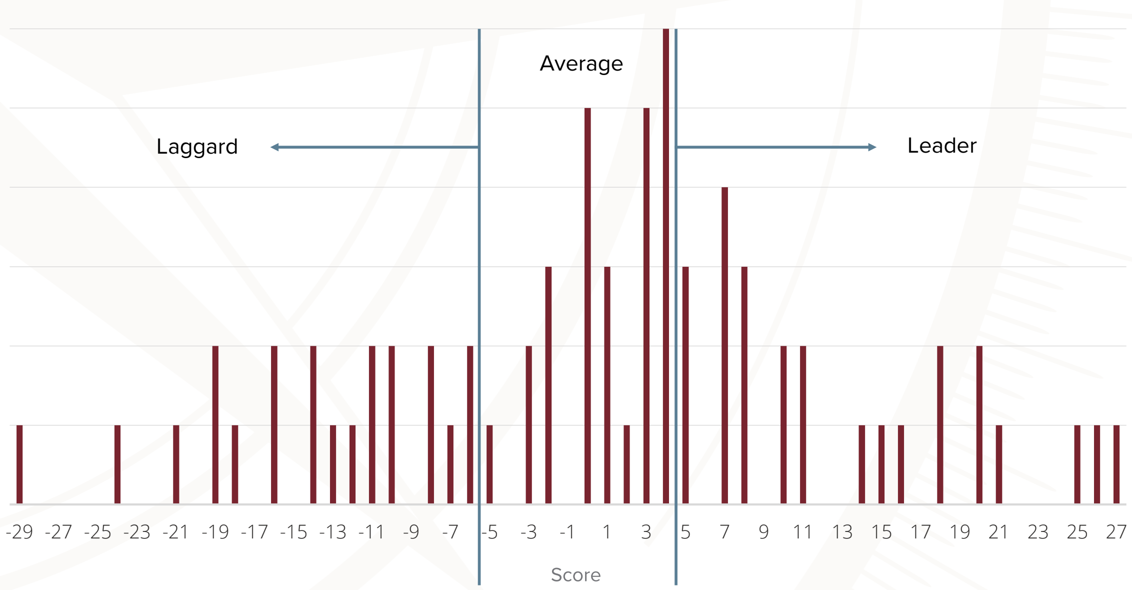
As in previous years, we asked respondents if they were ahead or behind their competitors in 22 functional areas including design, content development, social media, content marketing, search engine optimization (SEO), digital advertising and many others. The responses were then scored with two points for those organizations significantly outperforming their peers, one point for outperforming, zero for performing about the same, negative one point for underperforming and negative two points for significantly underperforming.

This year our scores were fairly well balanced around zero. We selected all scores below -5 to be laggards, organizations scoring above +5 to be leaders and those scoring between -5 to +5 to be average.

We encourage readers to think about which group your organization is in and use that benchmark as a guide to find actionable insights to help you move to the next level — or protect your standing.

- **Leaders:** Self-selected that they are ahead of their competition in digital marketing efforts (Net ahead-behind > 5; 34% of respondents).
- **Average:** (Net ahead-behind between -5 and +5; 39% of respondents).
- **Laggards:** Self-selected that they are behind their competition in digital marketing efforts (Net ahead-behind < -5; 27% of respondents).

Leader/Laggard Distribution



Leaders, Average and Laggards

The leader, average and laggard segments are defined by how respondents rate their own performance across 22 functional areas. Across the segments, health systems feel very good about their performance in social media followed by web hosting, web design, business listing management and digital advertising.

This year, leaders feel particularly strong about their performance in digital advertising. Average organizations scored web design capabilities and social media performance highest. Laggards felt best about web hosting, followed by social media.

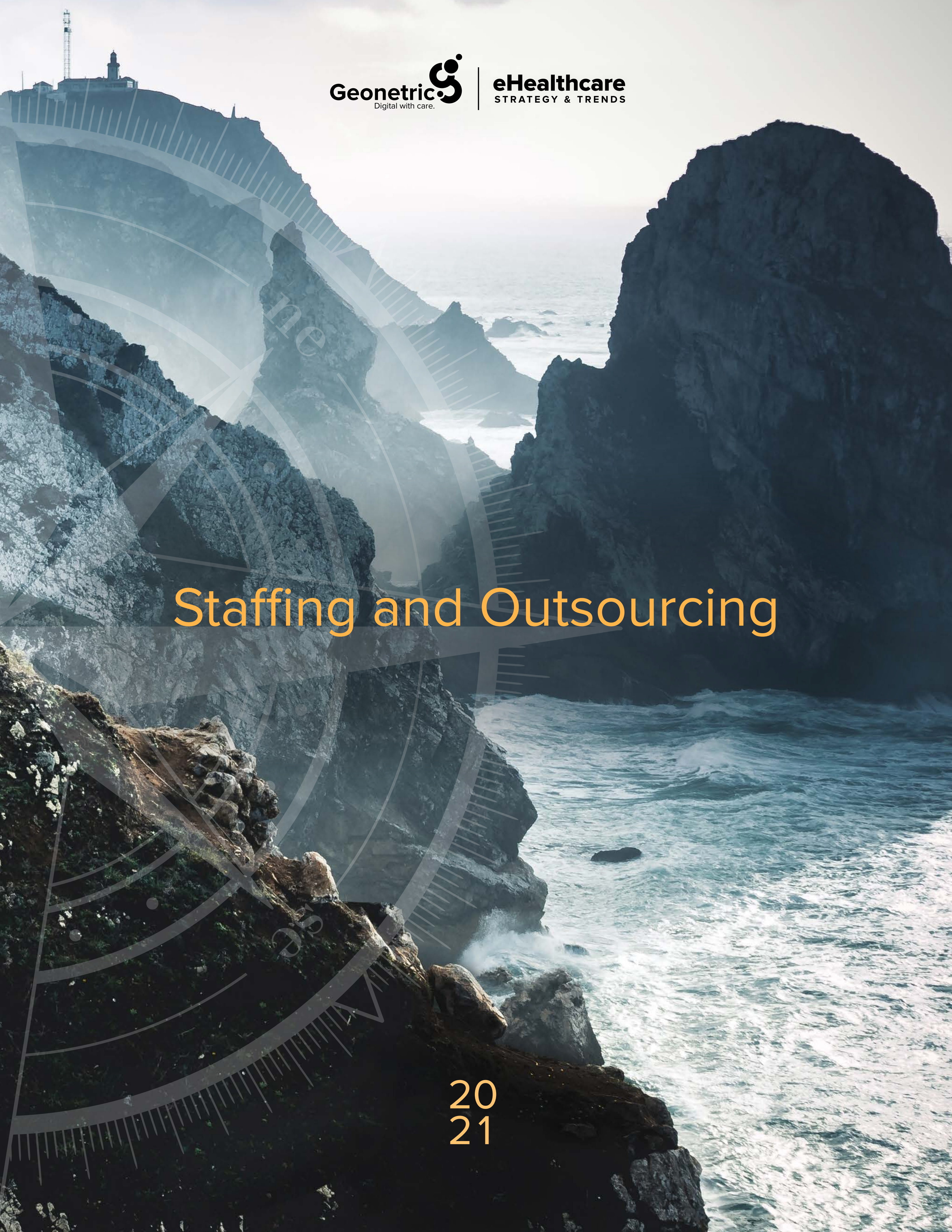
Respondents feel less strong about their intranets, customer relationship management (CRM), marketing automation and mobile app capabilities.

Looking at areas where leaders outperform other segments, content marketing and content development were joined at the top of the list by digital strategy. Additional areas where leaders surpass others include digital strategy, digital advertising and analytics. These scores were nearly two full points higher for leaders than for laggards.

Performance by Function

	Laggard	Average	Leader	Overall	L/L Delta
Social media and community management	0.09	0.56	1.04	0.59	0.95
Web hosting	0.23	0.41	0.54	0.40	0.31
Web design	-0.22	0.56	0.71	0.40	0.93
Local search or business listing management	-0.35	0.31	0.93	0.34	1.28
Digital advertising	-0.61	0.25	1.22	0.33	1.83
General website management	-0.57	0.25	1.00	0.28	1.57
Video production	-0.61	0.32	0.89	0.26	1.50
Web development	-0.30	0.32	0.57	0.23	0.88
Search engine optimization (SEO)	-0.77	0.31	0.93	0.22	1.70
Digital strategy	-0.91	0.25	1.00	0.18	1.91
Web accessibility	-0.26	0.16	0.48	0.15	0.74
Content development	-1.00	0.25	0.89	0.11	1.89
Online reputation management	-0.39	-0.25	0.89	0.10	1.28
Content marketing	-1.00	0.19	0.92	0.08	1.92
Project management	-0.70	0.09	0.46	0.00	1.16
User experience	-0.83	-0.06	0.64	-0.04	1.47
Analytics	-1.09	-0.09	0.74	-0.10	1.83
User research/testing	-1.17	-0.34	0.14	-0.41	1.32
Personalization	-0.91	-0.53	0.07	-0.43	0.98
CRM	-1.22	-0.58	0.19	-0.51	1.41
Email or marketing automation	-1.30	-0.69	0.25	-0.54	1.55
Mobile app development	-1.30	-0.68	0.18	-0.56	1.48

Values -2 to +2



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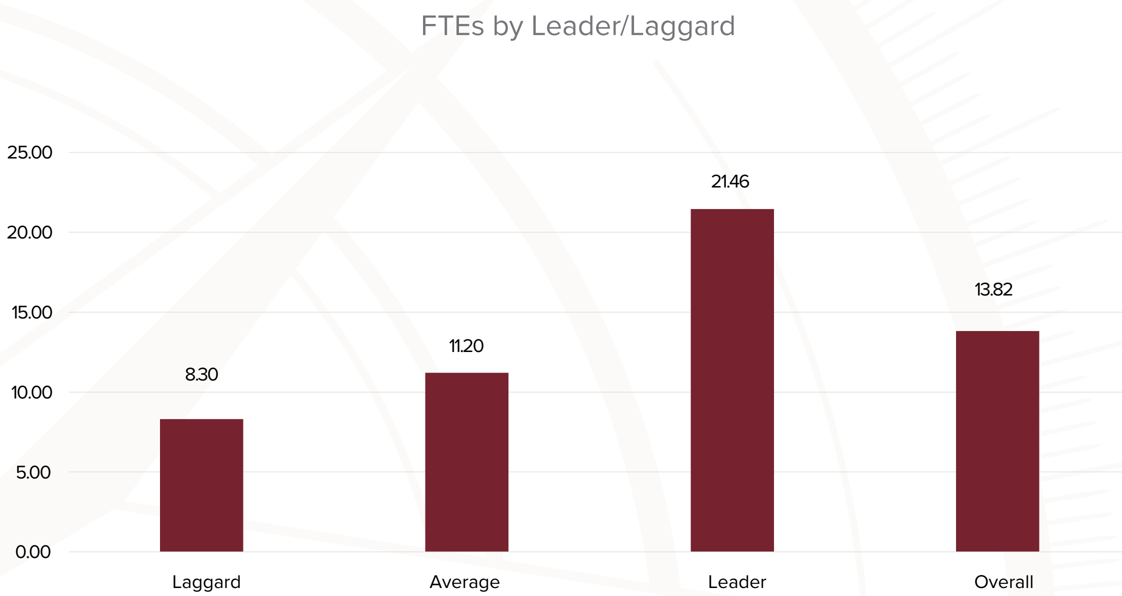
Staffing and Outsourcing

2021

Team Size

Staffing is key to digital marketing success. When looking at mean team sizes, leaders have 21 full-time equivalents (FTEs), average organizations have 11 FTEs and laggards have eight FTEs. It's important to note leaders tend to be bigger organizations. Compared to last year's data, leaders have increased staff size by two FTEs, average have decreased by two and laggards have stayed virtually the same.



Staffing Averages by Role and Leader/Laggard

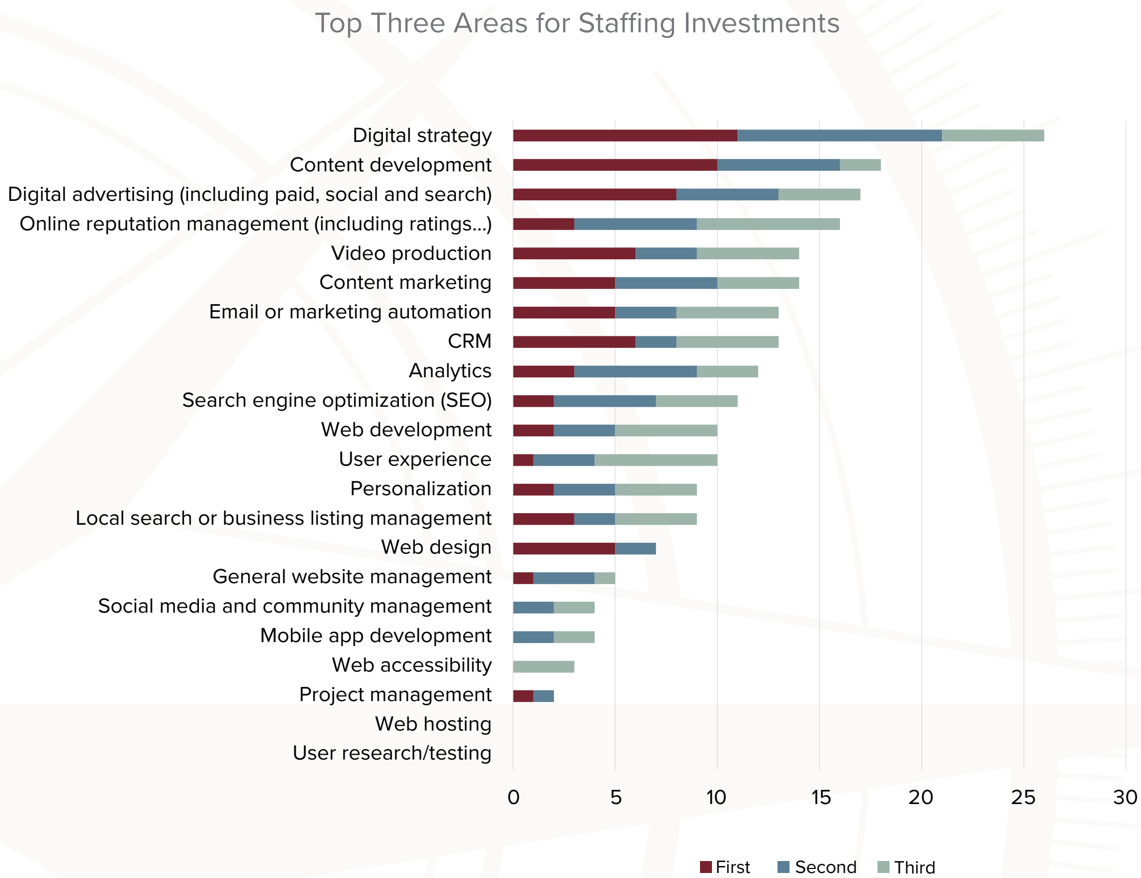
While team sizes overall remain consistent, there appears to be more specialization. In 2020, the most common role was general website management. This year, content development moves to the top spot led by continued strong investment from leaders who now boast more than two full FTEs in the role. This year also saw big growth in staffing for project management and analytics.

Average FTEs by Role and Leader/Laggard

	Laggard	Average	Leader	Overall	L/L Delta
Content development	0.54	0.97	2.14	1.24	1.60
Project management	0.70	0.62	2.07	1.14	1.37
Analytics	0.36	0.62	1.81	0.95	1.45
Content marketing	0.79	0.85	1.13	0.92	0.34
Social media and community management	0.69	0.81	1.24	0.92	0.55
General website management	0.51	0.72	1.35	0.87	0.85
Video production	0.55	0.64	1.40	0.86	0.84
Digital advertising	0.37	0.71	1.10	0.75	0.73
Digital strategy	0.43	0.60	0.95	0.68	0.51
Local search or business listing management	0.48	0.56	0.62	0.56	0.14
Online reputation management	0.43	0.48	0.67	0.53	0.24
CRM	0.37	0.41	0.73	0.51	0.36
Email or marketing automation	0.40	0.48	0.61	0.50	0.20
Web development	0.32	0.28	0.92	0.50	0.59
Web design	0.28	0.43	0.75	0.49	0.47
User experience	0.22	0.50	0.66	0.48	0.44
Search engine optimization	0.27	0.41	0.71	0.47	0.43
Web accessibility	0.24	0.24	0.75	0.40	0.51
Mobile app development	0.04	0.21	0.68	0.32	0.63
Personalization	0.07	0.26	0.50	0.29	0.43
User research/testing	0.09	0.24	0.46	0.27	0.37
Web hosting	0.13	0.18	0.23	0.18	0.10
Total:	8.30	11.20	21.46	13.82	

Staffing Investments

Respondents were asked about staffing growth and projected changes in the coming year. While some of the top staffing areas are also top areas for growth such as content development and digital advertising, the runaway leader for future staffing investments in healthcare digital marketing for the coming year is digital strategy.



Outsourcing

Outsourcing trends have held steady from past years with the most outsourcing occurring in web hosting and development, digital advertising, web design and business listing management. Leaders are more heavily investing in outside partners for CRM, mobile app development and analytics.

Outsourcing by Leader/Laggard

	Laggard	Average	Leader	Overall	L/L Delta
Social media and community management	0.52	0.55	0.62	0.57	0.10
Project management	0.86	0.61	0.76	0.73	-0.10
Personalization	1.11	1.04	1.00	1.04	-0.11
Email or marketing automation	1.23	1.03	1.30	1.19	0.07
Content marketing	1.38	1.06	1.41	1.27	0.03
Content development	1.38	1.19	1.37	1.30	-0.01
Mobile app development	1.05	1.42	1.48	1.33	0.43
User experience	1.32	1.46	1.22	1.33	-0.09
CRM	0.95	1.33	1.65	1.35	0.71
User research/testing	1.42	1.72	1.20	1.45	-0.22
General website management	1.90	1.34	1.28	1.46	-0.62
Digital strategy	1.95	1.34	1.46	1.54	-0.49
Analytics	1.35	1.73	1.66	1.61	0.31
Video production	1.50	1.87	1.41	1.61	-0.09
Online reputation management	1.90	1.44	1.64	1.64	-0.26
Web accessibility	2.20	1.46	1.56	1.70	-0.64
Search engine optimization (SEO)	1.77	1.63	1.77	1.72	-0.01
Local search or business listing management	1.90	1.77	1.79	1.81	-0.12
Web design	2.52	1.80	1.86	2.01	-0.67
Digital advertising	2.33	1.85	2.00	2.02	-0.33
Web development	2.43	2.32	1.92	2.21	-0.51
Web hosting	3.00	3.04	2.96	3.00	-0.04

Higher score = more outsourcing, Range = 0 to 4

Outsourcing Trends

While most organizations are maintaining a balance of internal staff and outsourcing, many organizations are shifting that balance. There's a bias toward doing more in-house amongst our average and leader groups while laggards, with smaller in-house teams, are leaning much more heavily on outside resources to get work done.

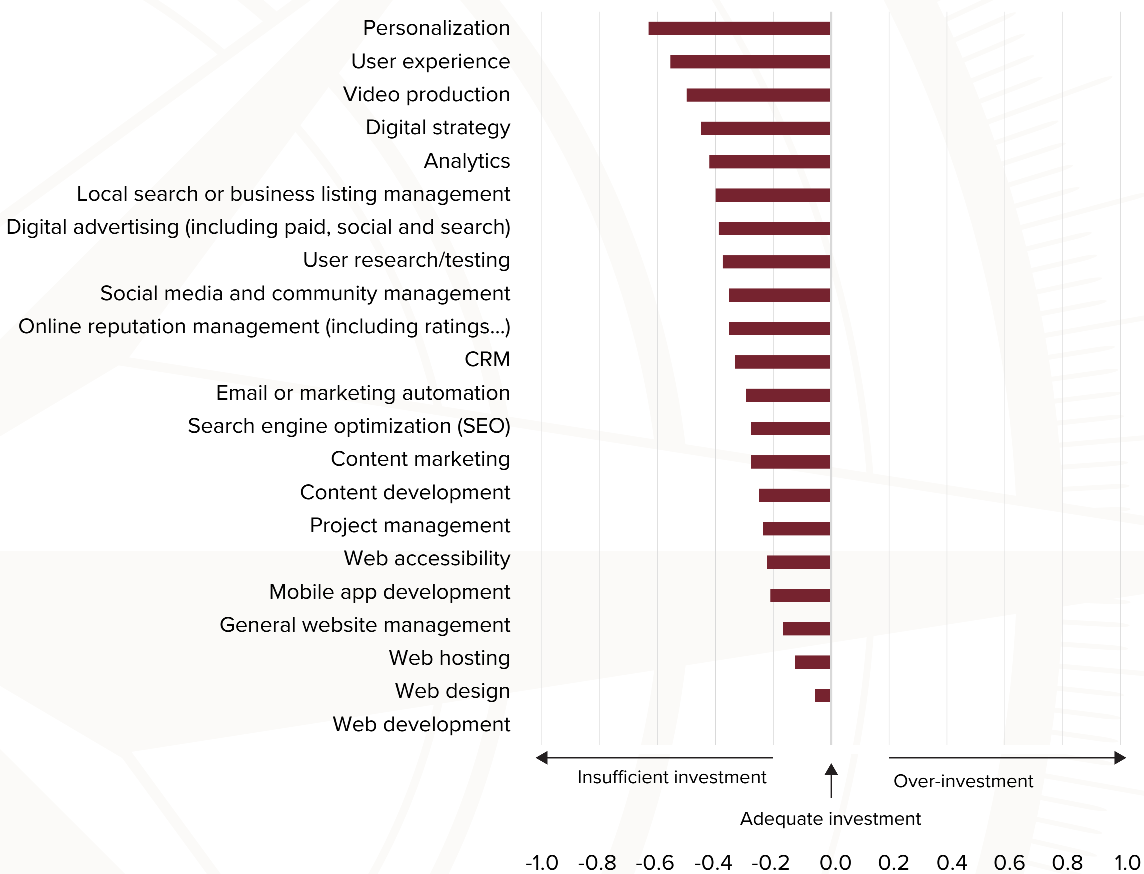
Outsourcing Trends

In the coming year, we plan to...	Laggard	Average	Leader	Overall
Do a greater portion of our digital marketing work in-house.	18%	22%	20%	20%
Keep our current balance of in-sourcing and outsourcing.	36%	66%	68%	58%
Do a greater portion of our digital marketing work through agency/vendor partners.	45%	13%	12%	22%

Agency Perspective: Level of Client Investment

Agency and vendor respondents shared their perspectives on where their client health systems are investing adequately, underinvesting and over-investing. Overall, not a single category fell into the overinvestment segment, although web development had adequate investment. The areas most noted for insufficient investment by their healthcare clients include personalization, user experience, video production and digital strategy — all areas marked for strong growth in the year to come.

Agency Perspective: Level of Client Investment



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Digital Marketing Budgets

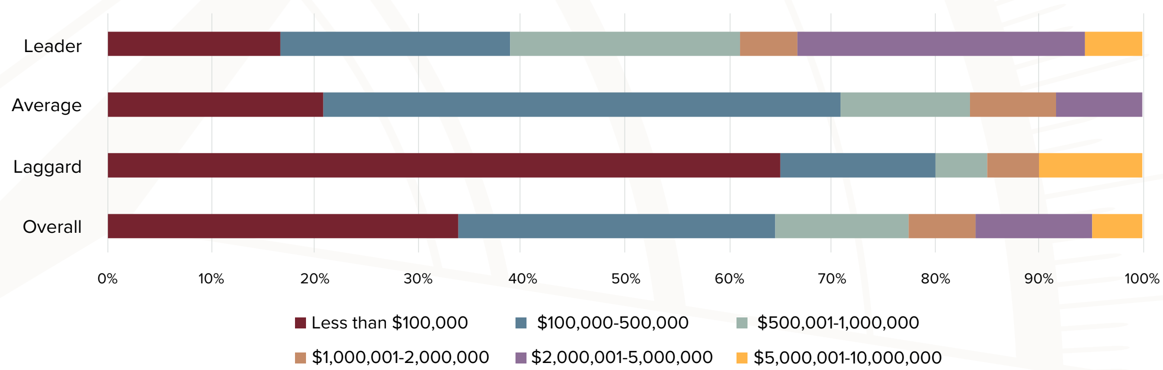
2021

Non-staff Digital Marketing Budget

Leaders are spending significantly more than the other segments with a total non-staff digital marketing investment topping 1.7 million dollars. Interestingly, the laggard segment is averaging close to a million dollars and the average segment — at just over two-thirds of a million dollars — is much lower than the laggards. The reason behind this is likely the size of the organizations in those groups. This year, some large organizations self-selected into the laggard group. When we look at these investments on a per-bed basis, the average cohort is actually investing the most per bed at $2,090.

When looking at median budgets, laggards report less than $100,000, average reports $100,000-500,000 and leaders report $500,000 to one million dollars.

Median Non-staff Digital Marketing Budget



Average Non-staff Digital Marketing Budget

	Average non-staff digital marketing budget	Average of investment per bed
Leader	$1,713,888.89	$1,797.34
Average	$670,833.33	$2,090.50
Laggard	$940,000.00	$1,609.95
Overall	$1,060,483.87	$1,852.35

Percentage of Marketing Budgets Dedicated to Digital

Overall, just over a third of marketing budgets are now dedicated to digital with little variation between the leader and laggard groups. The interesting shift this year is the number of organizations indicating that their digital initiatives have an independent budget rather than coming from the overall marketing budget. Nearly two in 10 respondents this year noted that they had an independent digital budget, with nearly three in 10 digital leaders using this structure.

Percentage of Marketing Budget Dedicated to Digital	
Leader	32.26%
Average	38.21%
Laggard	30.53%
Overall	34.29%

Digital Budget Does Not Come From Marketing Budget	
Leader	29.63%
Average	12.50%
Laggard	17.39%
Overall	19.51%

Budget Expectations

After 2020, budgets saw the largest cuts experienced in the 15 years this survey has been running, so it's no surprise that 2021 is seeing significant increases. Laggards, who were most likely to see cuts coming into this year, are also most likely to see increases in the coming year. Despite these rebounds, a higher-than-normal number of organizations are seeing cuts to their overall and digital marketing budgets.

Overall Marketing Budget Expectations

Overall marketing budget expectations for the coming year				
	Laggard	Average	Leader	Overall
Increase	68.42%	46.15%	29.17%	46.38%
Remain the same	26.32%	53.85%	66.67%	50.72%
Decrease	5.26%	0.00%	4.17%	2.90%

Digital Marketing Budget Expectations

Digital marketing budget expectations for the coming year				
	Laggard	Average	Leader	Overall
Increase	65.00%	42.31%	41.67%	48.57%
Remain the same	30.00%	57.69%	50.00%	47.14%
Decrease	5.00%	0.00%	8.33%	4.29%

Budgets Compared to Pre-pandemic

Due to the budgetary roller coaster of the pandemic, respondents were asked how budgets are shifting at this moment in time and how budgets compare with the pre-pandemic normal. Overall marketing budgets cover a wide range, with roughly the same number exceeding their pre-pandemic levels as those still behind where they were prior.

Interestingly laggards, who traditionally have had smaller relative budgets, are seeing the highest percentage of future budgets ahead of where they were pre-pandemic. Digital marketing budgets are faring somewhat better, with more than twice the number of respondents exceeding pre-pandemic budget levels.

Overall Marketing Budgets Today Compared to Pre-pandemic

	Laggard	Average	Leader	Overall
Higher than before the pandemic	33.33%	20.69%	19.05%	23.94%
About the same as before the pandemic	47.62%	55.17%	66.67%	56.34%
Lower than before the pandemic	19.05%	24.14%	14.29%	19.72%

Digital Marketing Budgets Today Compared to Pre-pandemic

	Laggard	Average	Leader	Overall
Higher than before the pandemic	42.86%	37.04%	12.00%	30.14%
About the same as before the pandemic	42.86%	51.85%	72.00%	56.16%
Lower than before the pandemic	14.29%	11.11%	16.00%	13.70%

Shifts in Traditional Budgets to Digital Budgets

Digital marketing budgets are faring better than overall marketing budgets, in part because of a continued shift of marketing resources from traditional channels to digital. That shift has not only continued throughout the pandemic crisis but has picked up speed in more than four in 10 respondents' organizations.

Shifts in Traditional Budgets to Digital Budgets

	Laggard	Average	Leader	Overall
Faster than in the past	52.38%	39.29%	36.00%	41.89%
At the same pace as in the past	33.33%	60.71%	56.00%	51.35%
More slowly than in the past	14.29%	0.00%	8.00%	6.76%

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Digital Marketing Strategy

2021

Top Goals

In 2020, with pandemic-related closures and reopenings, patient acquisition jumped to the top of the list of priorities. This year, there is a return to softer metrics with consumer experience and consumer engagement taking the top two spots. Financial and digital transformation metrics followed, then goals related to other audiences — physicians, employees and donors.

Importance to Digital Marketing Success

	Scored
Consumer experience	3.35
Consumer engagement	3.20
Patient satisfaction	3.16
Consumer awareness	3.08
Patient acquisition	3.07
Return on investment (ROI)	3.07
Revenue	2.93
Profitability	2.69
Digital transformation	2.66
Employee recruiting efforts	2.57
Community relations	2.34
Physician engagement	2.33
Population health	2.12
Fundraising/giving	1.68

Ability to Demonstrate Impact

Looking at that same list of top goals through the lens of the ability to demonstrate value, respondents indicate they have the greatest clarity on consumer and patient goals and the least clarity in the areas of population health, physician engagement, fundraising and community awareness.

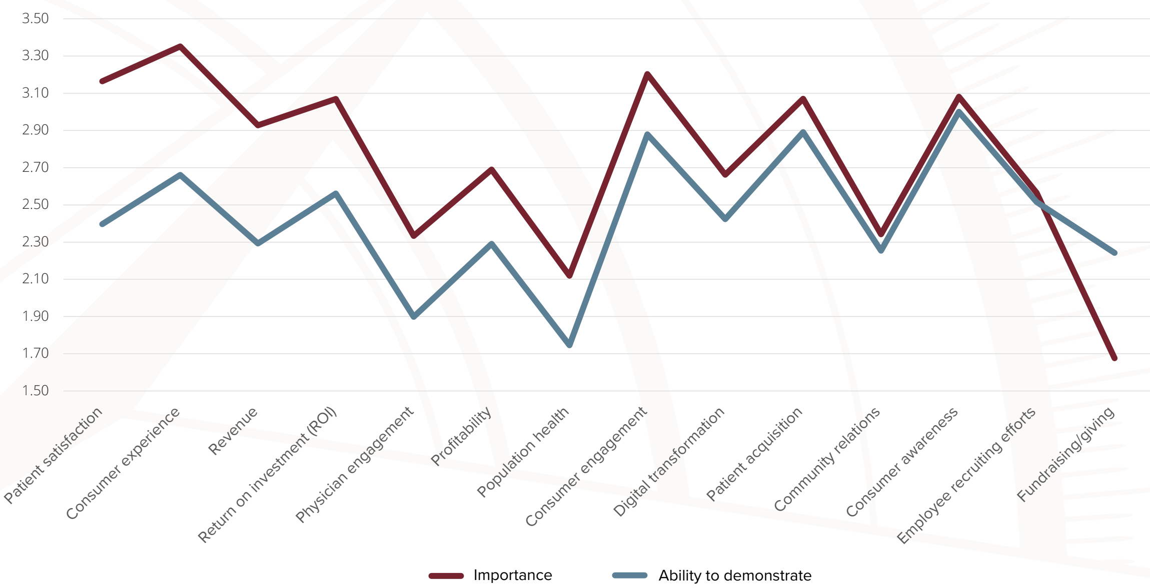
Ability to Demonstrate Digital Marketing Success

	Scored
Consumer awareness	3.00
Patient acquisition	2.89
Consumer engagement	2.88
Consumer experience	2.66
Return on investment (ROI)	2.56
Employee recruiting efforts	2.52
Digital transformation	2.42
Patient satisfaction	2.40
Revenue	2.29
Profitability	2.29
Community relations	2.25
Fundraising/giving	2.24
Position engagement	1.90
Population health	1.75

Top Goals vs. Ability to Demonstrate Impact

When comparing the importance of goals to an organization's ability to demonstrate how digital marketing has impacted those goals, gaps emerge. The greatest gaps reported are in patient satisfaction and consumer experience, followed by revenue and ROI.

Gap Analysis: Importance vs. Ability to Demonstrate



ROI Reporting

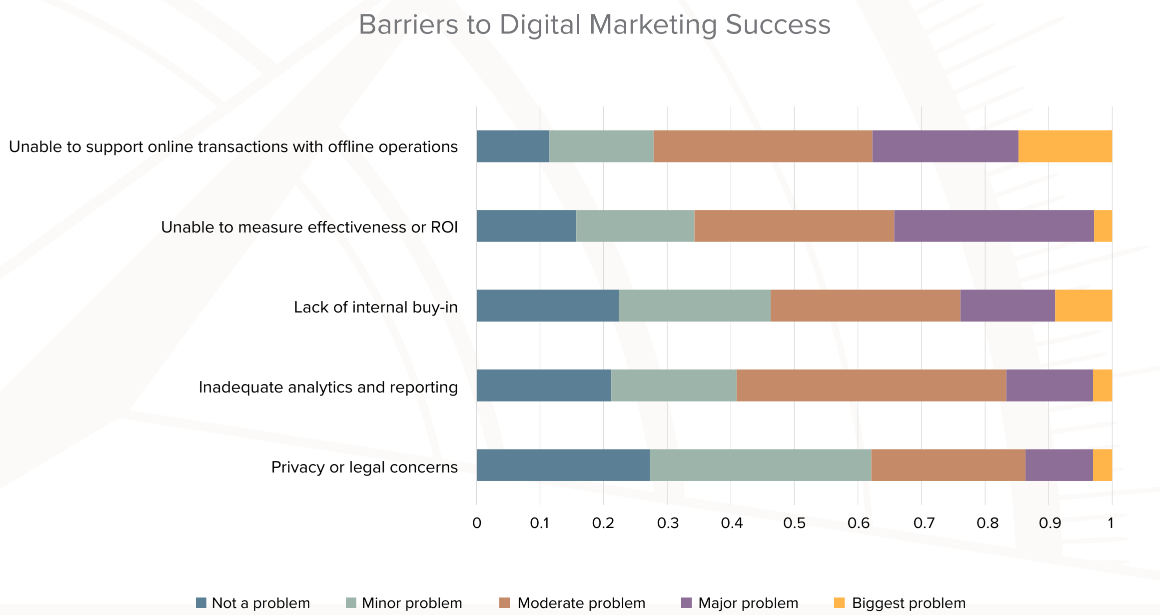
Although the ability to demonstrate ROI is improving across the board, and despite the ongoing implementation of stronger CRM platforms, a lack of tools or infrastructure for tracking ROI continues to be the top barrier to success. While in years past many respondents indicated that there was no formal justification to prove ROI, that seems to be changing. In fact, for the first time ever, no leaders noted this as a challenge.

Reasons for Lack of ROI Reporting

	Leader	Average	Laggard	Overall
Lack of tools/infrastructure	80%	58%	90%	74%
Lack of expertise	20%	50%	70%	52%
No formal justification required (no one's asking)	0%	33%	50%	33%
Need an easier way	20%	17%	10%	15%
Too time-consuming	20%	17%	10%	15%
We can measure ROI but it's not positive/improving	0%	8%	0%	4%

Barriers to Digital Marketing Success

When looking at barriers to overall digital marketing success, the top response this year is the inability to support online transactions with offline operations. In past years, this was primarily an issue for leaders but wasn't as significant a barrier for the other segments. In 2019, due to the pandemic forcing many to rethink how to take offline interactions online, the shift started and it became more of a barrier for all segments. The fact it is still the top barrier is indicative of the shifts that healthcare web operations are undergoing with more interactions and transactions moving digital.



Importance of Marketing Channels

For the first time, survey respondents ranked the importance of different digital marketing channels. Most of the top channels are no surprise — the website, search (organic and paid) and Facebook (organic and paid). Content marketing taking the number three most important spot overall represents the value being realized by many healthcare organizations who are investing in content marketing as a marketing channel.

Across every social media channel, organic use of the channel is considered more important by respondents than paid. Although that gap has nearly disappeared in some key channels like Facebook, search and YouTube — particularly amongst digital leaders — while other social ad platforms like LinkedIn and Twitter fall far short of the value placed in their organic usage.

Newer channels like TikTok and Snapchat are at the bottom of the list, accompanied by hyperlocal social media platforms like Nextdoor and medically-focused channels like Sermo and Doximity.

Marketing Channels by Importance

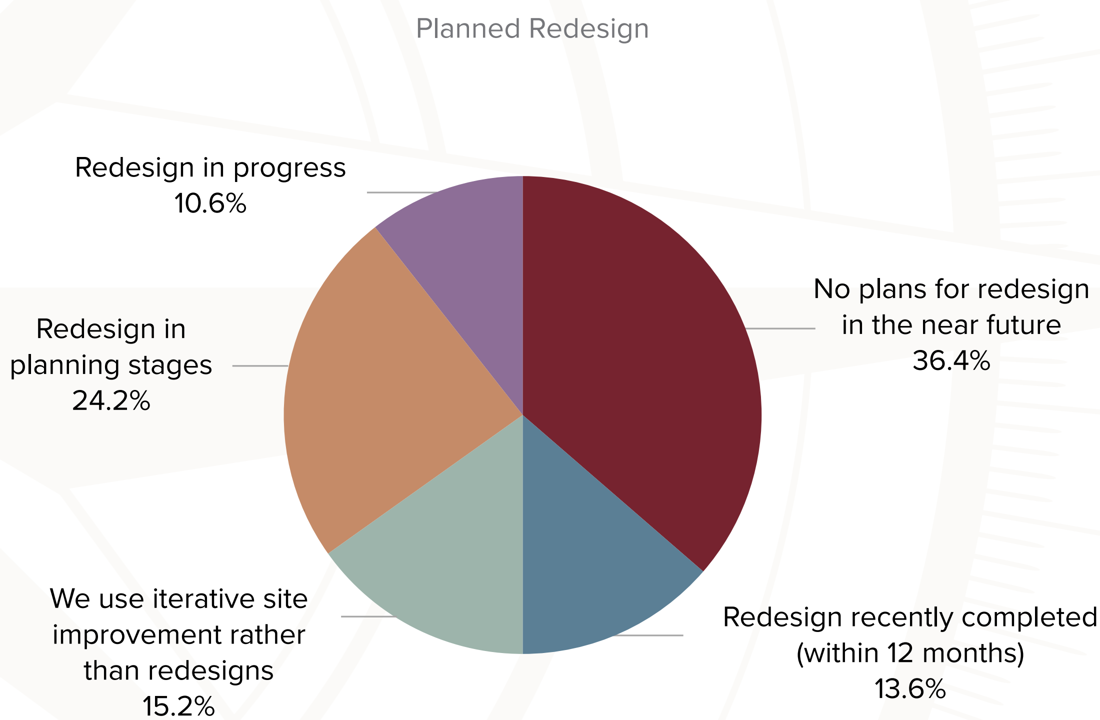
	Leader	Average	Laggard	Overall
Website	2.26	2.19	2.29	2.24
Search (organic)	2.32	2.23	2.11	2.23
Content marketing	2.22	2.26	1.94	2.16
Paid search (e.g., Google ads, Bing ads)	2.13	2.11	1.75	2.03
Facebook (organic)	2.09	2.00	1.94	2.01
Facebook ads	2.00	2.00	1.71	1.93
Display ads	1.91	1.88	1.47	1.79
Email/marketing automation	1.65	1.73	2.00	1.78
YouTube (organic)	1.78	1.88	1.50	1.75
LinkedIn (organic)	1.83	1.48	1.50	1.60
Instagram (organic)	1.70	1.44	1.65	1.58
SMS/Text messaging	1.77	1.12	1.65	1.48
Instagram ads	1.61	1.46	1.24	1.45
Video ads	1.65	1.50	1.12	1.45
Twitter (organic)	1.48	1.40	1.22	1.38
Over the top (OTT)/Connected TV (CTV)	1.45	1.39	0.94	1.29
LinkedIn ads	1.00	1.31	1.00	1.12
Audio ads	1.32	1.15	0.75	1.11
Podcast	0.73	1.00	0.81	0.86
Hyperlocal social media (e.g., Nextdoor)	0.94	0.77	0.42	0.75
Specialty medical social media (e.g., Sermo, Doximity)	0.68	0.67	0.53	0.64
Twitter ads	0.55	0.52	0.50	0.52
TikTok (organic)	0.61	0.32	0.31	0.42
Snapchat (organic)	0.52	0.36	0.33	0.41
Snapchat ads	0.41	0.20	0.20	0.27
TikTok ads	0.41	0.12	0.20	0.24

Planned Redesigns

Every year, the survey looks to gain insight into website lifecycles. Over the years, that cycle has been as short as three to four years or as long as seven years. Last year, the pandemic had a dramatic effect on redesign plans. The demands of the pandemic stretched teams thin and many large projects, like web redesigns, were paused or postponed. Those delays didn't mean a lack of demand for web redesigns, and the survey signaled an optimism for a return to past priorities.

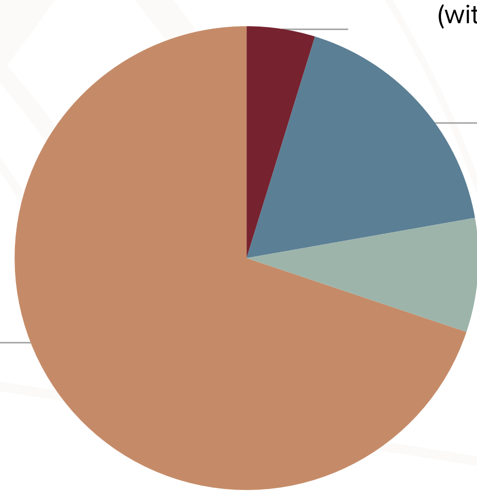
This year's numbers need to be considered a little differently as a new category was added — the use of iterative site improvements rather than big bang redesign efforts. The availability and adoption of better tools for A/B testing and ongoing optimization has led to some organizations looking to stretch the time between team-disrupting redesign projects — a suggestion from the survey's Advisory Board. More than 15% of respondents indicated that they were using a continuous-improvement site strategy.

Regardless, it seems that some of the delays of 2020 are continuing in 2021. Only 13.6% of respondents completed redesigns in the past year and little more than 10% are in process with them now. Those planning a redesign continue to be a big group at nearly a quarter of respondents.



Planned Platform Changes

Replatforming happens less often than redesigns, and this year's findings are similar to 2020. Continued project delays are likely the reason 15% were planning CMS changes in 2020 but only 4.8% have completed them and less than 8% are currently in process. When looking by segments, laggards are most likely to be considering a CMS change, with 23.5% indicating they are in planning stages.



Planned Redesigns and Platform Changes

CMS changes are rare when there isn't a redesign in process as well. For those redesigning now, 57% are changing or evaluating a change in platforms. For those in the planning stage for redesigns, 57% are considering a platform change and another 7% are committed to that change.

Planned Redesign vs. Planned CMS Change

	No plans to redesign in near future	Redesign recenlty completed	We use iterative site improvement	Redesign is in planning stages	Redesign in progress
No plans to change CMS in near future	100%	44%	88%	36%	43%
CMS change recently completed	0%	33%	0%	0%	0%
CMS change is in planning stages	0%	22%	0%	57%	14%
CMS change in progress	0%	0%	13%	7%	43%

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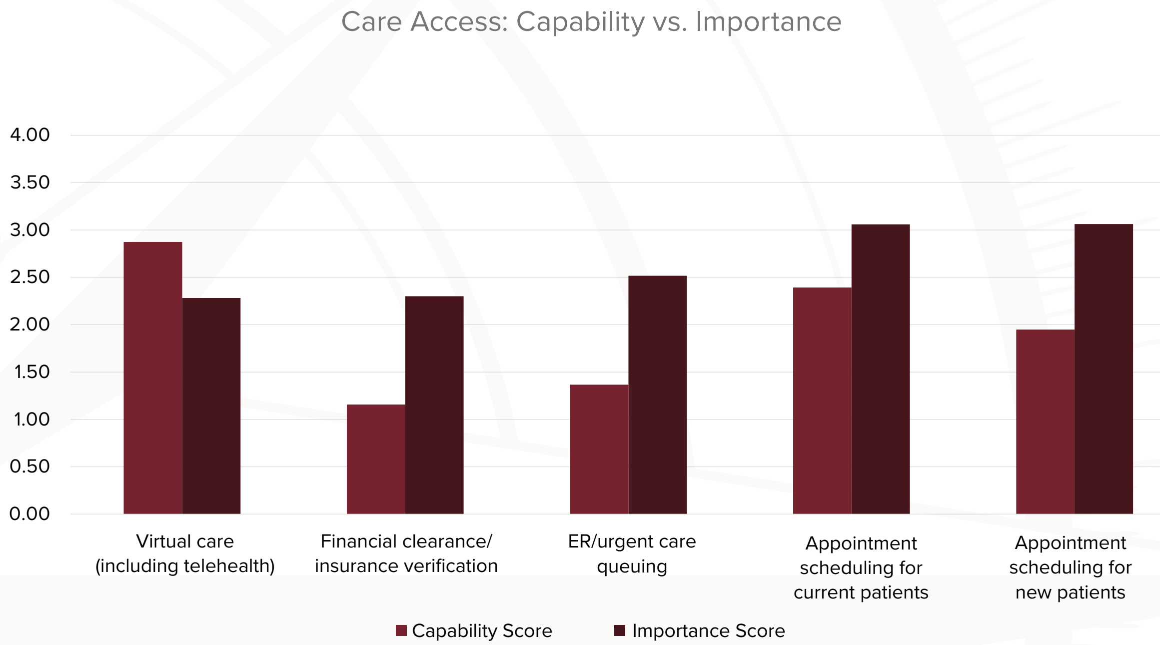
Care Access: Capability vs. Importance

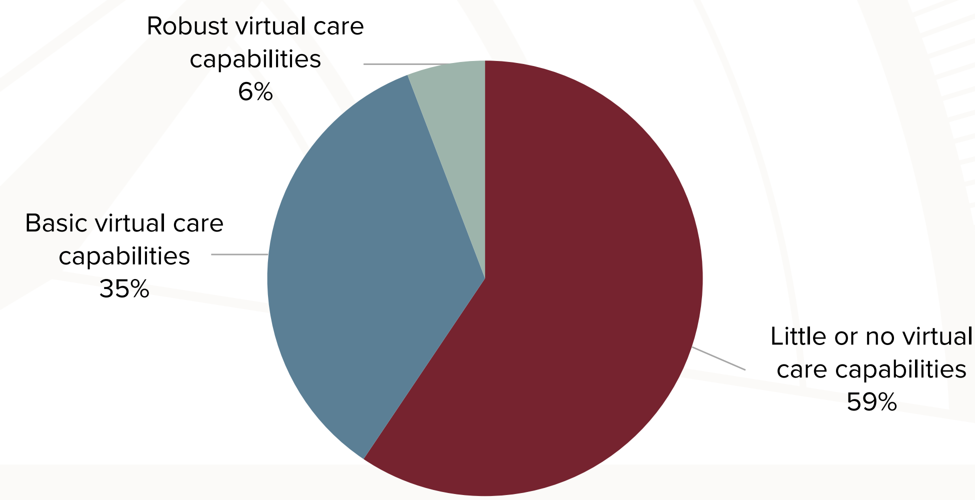
This year instead of evaluating website functionality, the survey explored how healthcare marketers are using the website to support digital transformation, or digital front door, initiatives. It's a testament to the progress made during the pandemic that the average capability score for virtual care/telehealth from survey respondents was higher than its importance. It could also indicate the rolling back of the importance of telehealth options as in-person care has become available again. Aside from virtual-care, performance and capabilities gaps exist between all remaining categories — appointment scheduling for new and current patients, emergency room queuing and insurance verification.



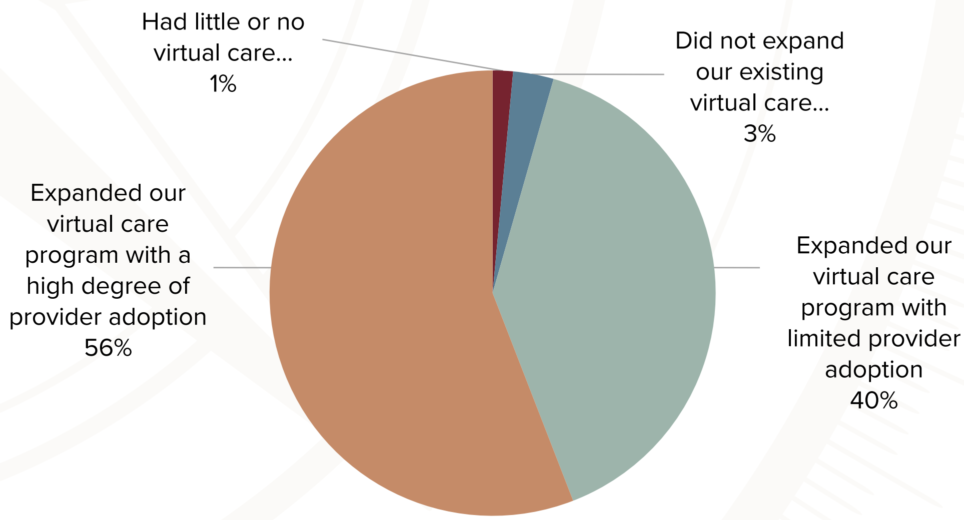
Expansion of Telehealth

Looking at the expansion of telehealth capabilities over the course of the pandemic has been eye-opening. Prior to the pandemic, some 65% of respondents' organizations had some sort of telehealth capabilities but only 6% of respondents characterized those capabilities as "robust." More than a third had no virtual care capabilities at all. Following the pandemic, only 1% of responding organizations had little or no virtual care capabilities. An impressive 96% expanded their virtual care programs with 56% indicating a "high degree of provider adoption." In general, those organizations with at least basic virtual care capabilities prior to the pandemic had greater success gaining provider adoption.

Before the pandemic, our organization had...

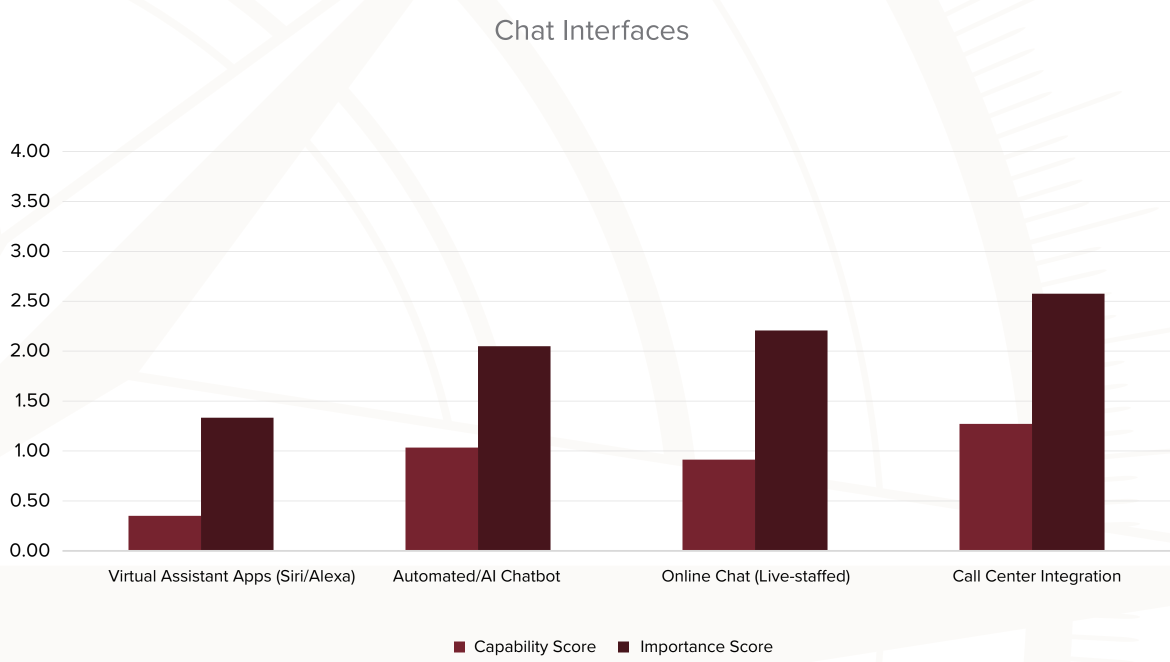


During the pandemic, our organization...



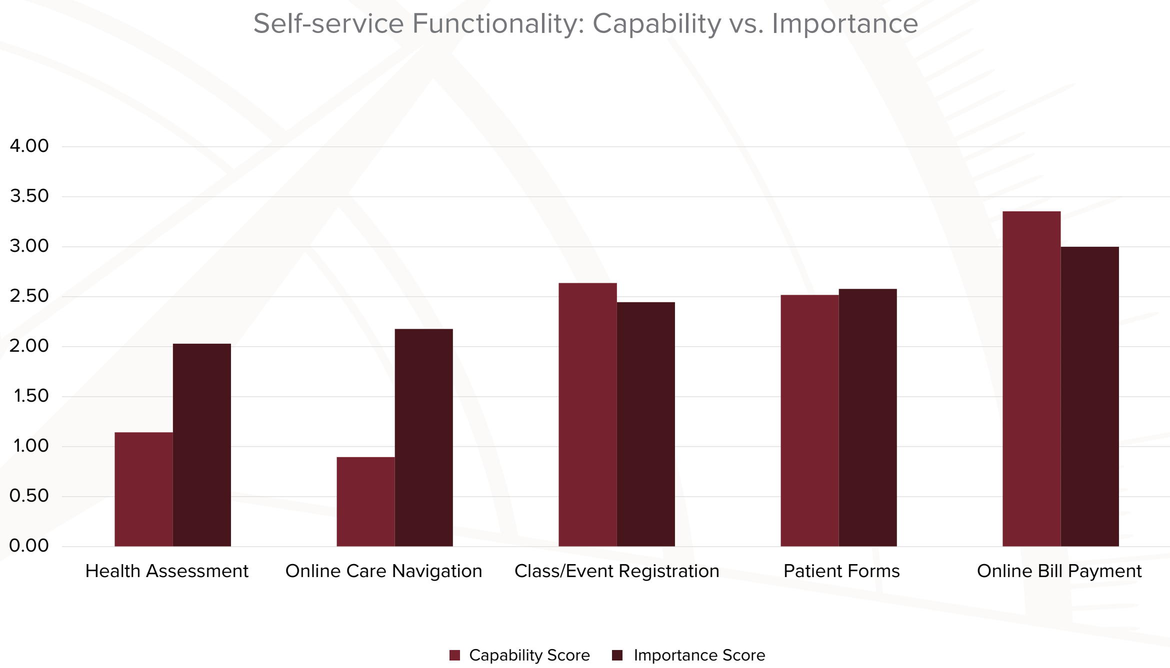
Chat Interfaces

Digital front door is also about offering diverse ways for patients and the community to connect to hospitals without picking up the phone. Leveraging call centers through integration with digital channels found the top of respondents’ priority lists in this category. Building “skills” or “apps” for virtual assistants such as Siri or Alexa was at the bottom. As a relatively new capability, the survey also asked respondents to share what they’re looking for in a good chatbot. Responses to this open-ended question ranged from improving efficiency ("cuts calls to the call center") to getting site visitors to the information they want more quickly ("gets answers [without] having to search through the website").



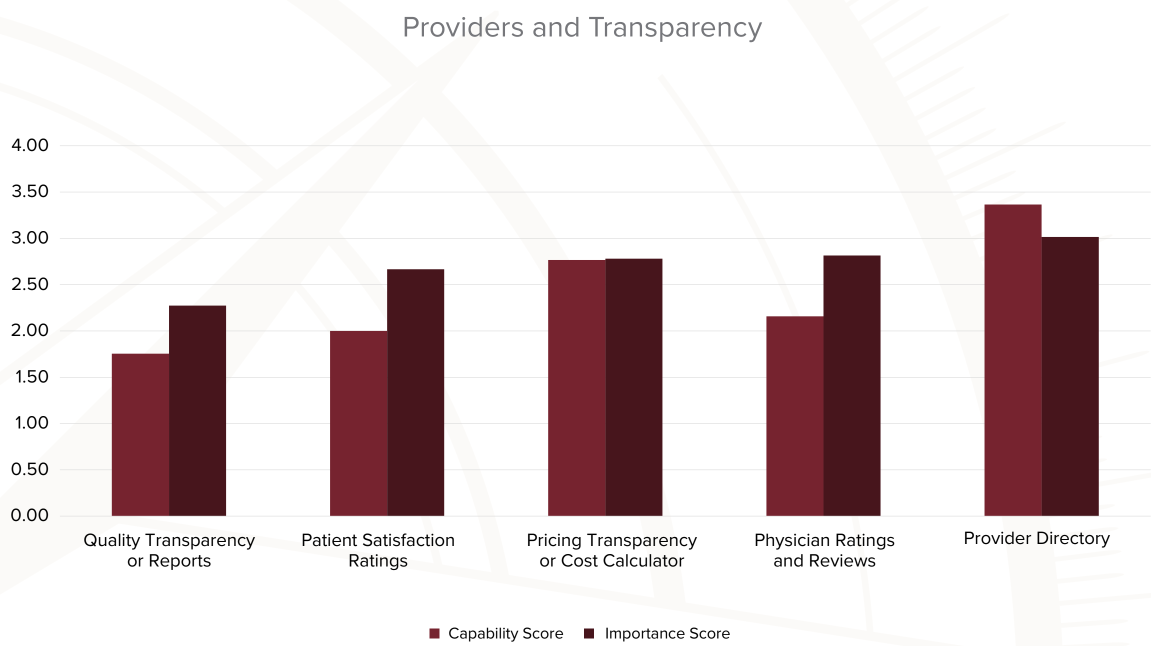
Self-service Functionality

Self-service capabilities are some of the pillars of the digital front door experience. The highest-importance items (online bill payment/patient forms/class and event registration) have been mainstays of the healthcare web experience for some time and see high capabilities to match their high levels of importance. Health assessments and online care navigation leave considerable room for improvement.



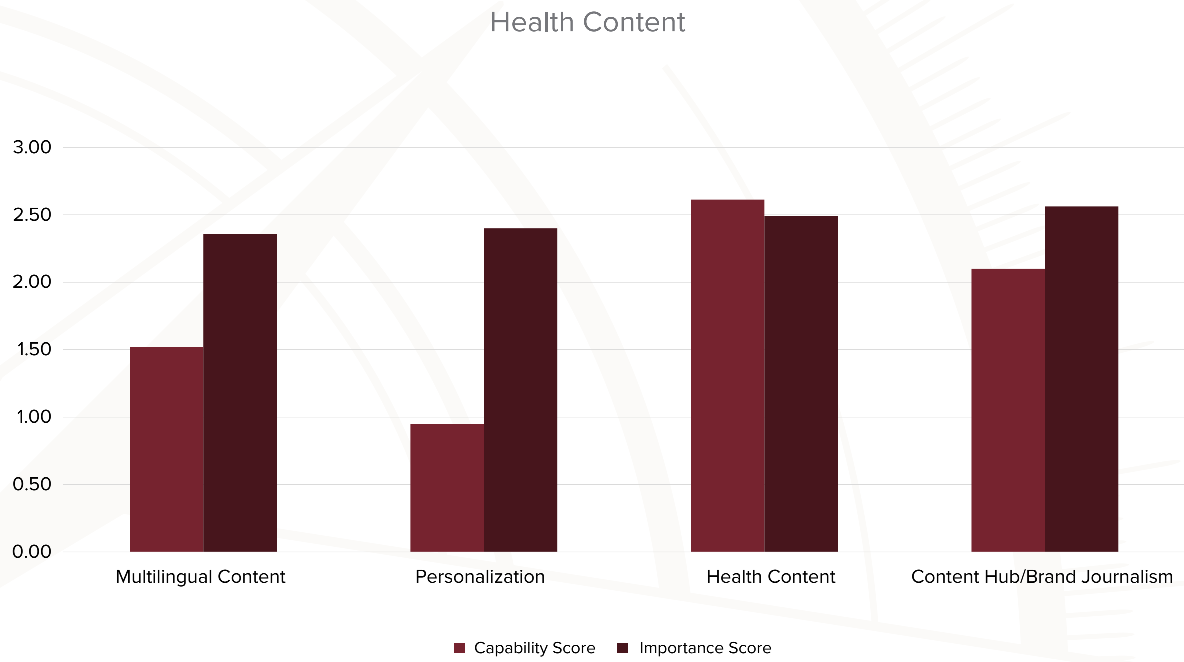
Providers and Transparency

Before making appointments, consumers need to select between healthcare organizations and find the right provider. High importance is placed on all of these items, but particularly on the provider directory and physician ratings and reviews. Capabilities are largely keeping pace with importance on the three pillars of transparency: pricing, patient satisfaction and quality.



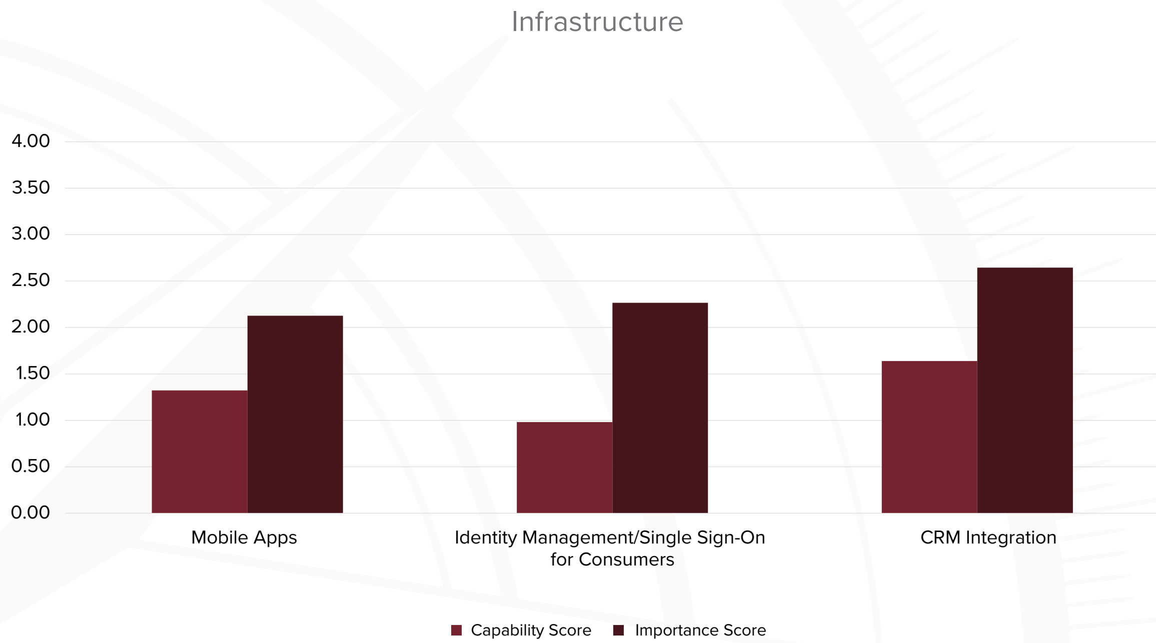
Health Content

Respondents indicated performance around content capabilities is mixed. The capabilities range from health content where capabilities match importance, to content hubs where capabilities have expanded enormously recently, to multilingual content that continues to lag behind importance, to personalization, which is the largest gap of any category.



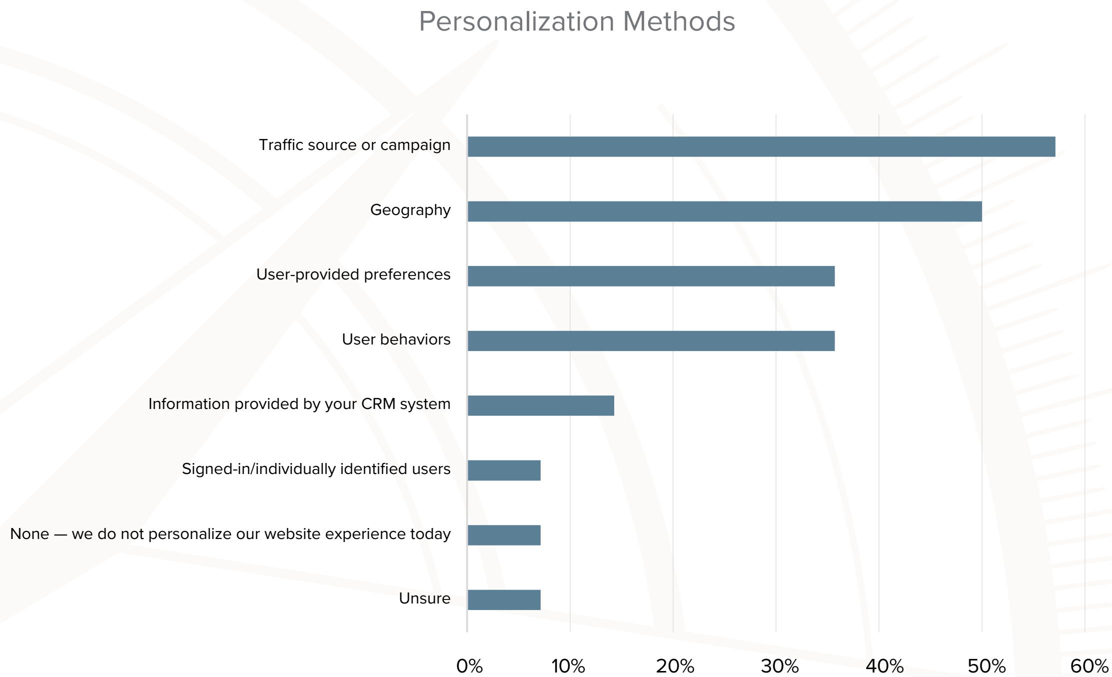
Infrastructure

Infrastructure is an area in need of growth in healthcare marketing overall and digital front door is no exception. Still, respondents indicate there has been good progress in recent years in mobile apps and CRM integration.



Personalization

Web personalization is gradually seeing more and more usage in healthcare. This year, personalizing by traffic source or campaign overtook geographic targeting as the top method used for healthcare web personalization.

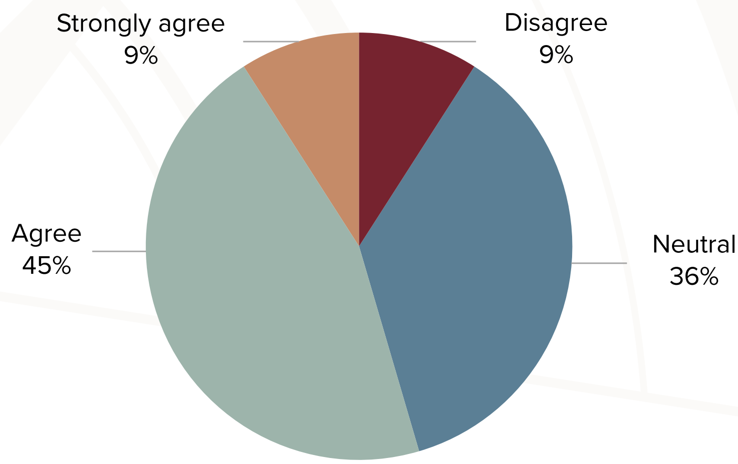


Ability to Demonstrate Value of Personalization

The value that respondents see in website personalization continues to gradually improve. More than half of survey respondents using web personalization agree or strongly agree that they can demonstrate the value. More importantly, no respondents strongly disagreed with the question.

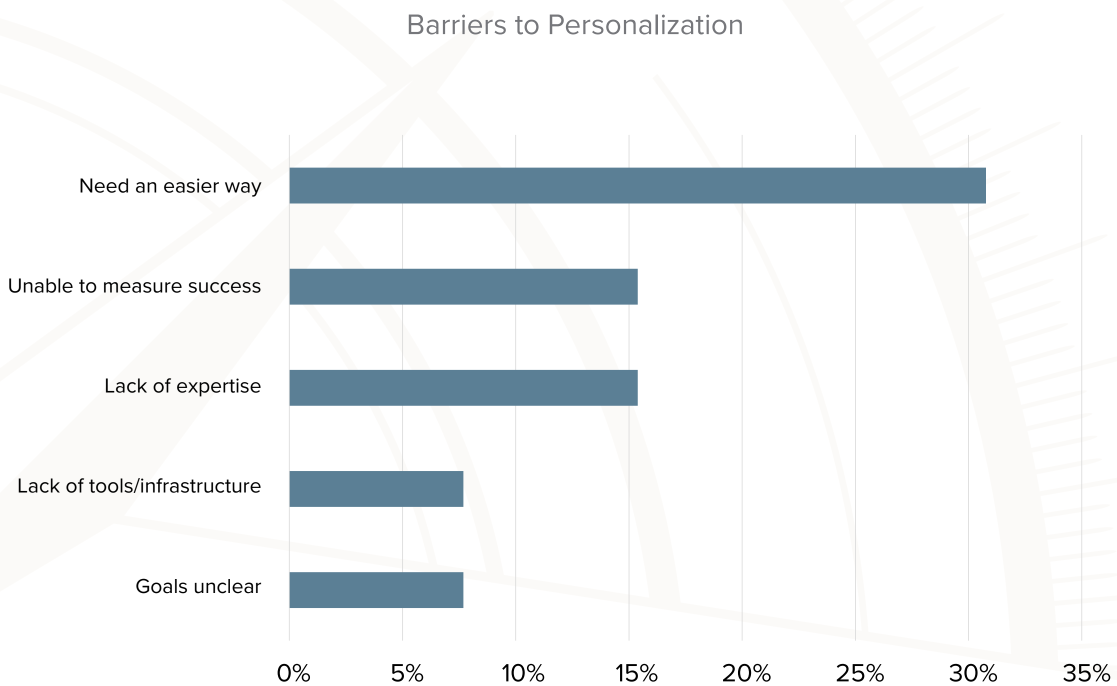
The Value of Personalization

Our organization can demonstrate that website personalization has improved the performance of our digital marketing



Barriers to Personalization

Challenges in executing web personalization and delivering value continue. This year, the most cited barrier to personalization success is the need for an easier way. The tools of personalization continue to be challenging to use and personalization campaigns are difficult to organize and coordinate.



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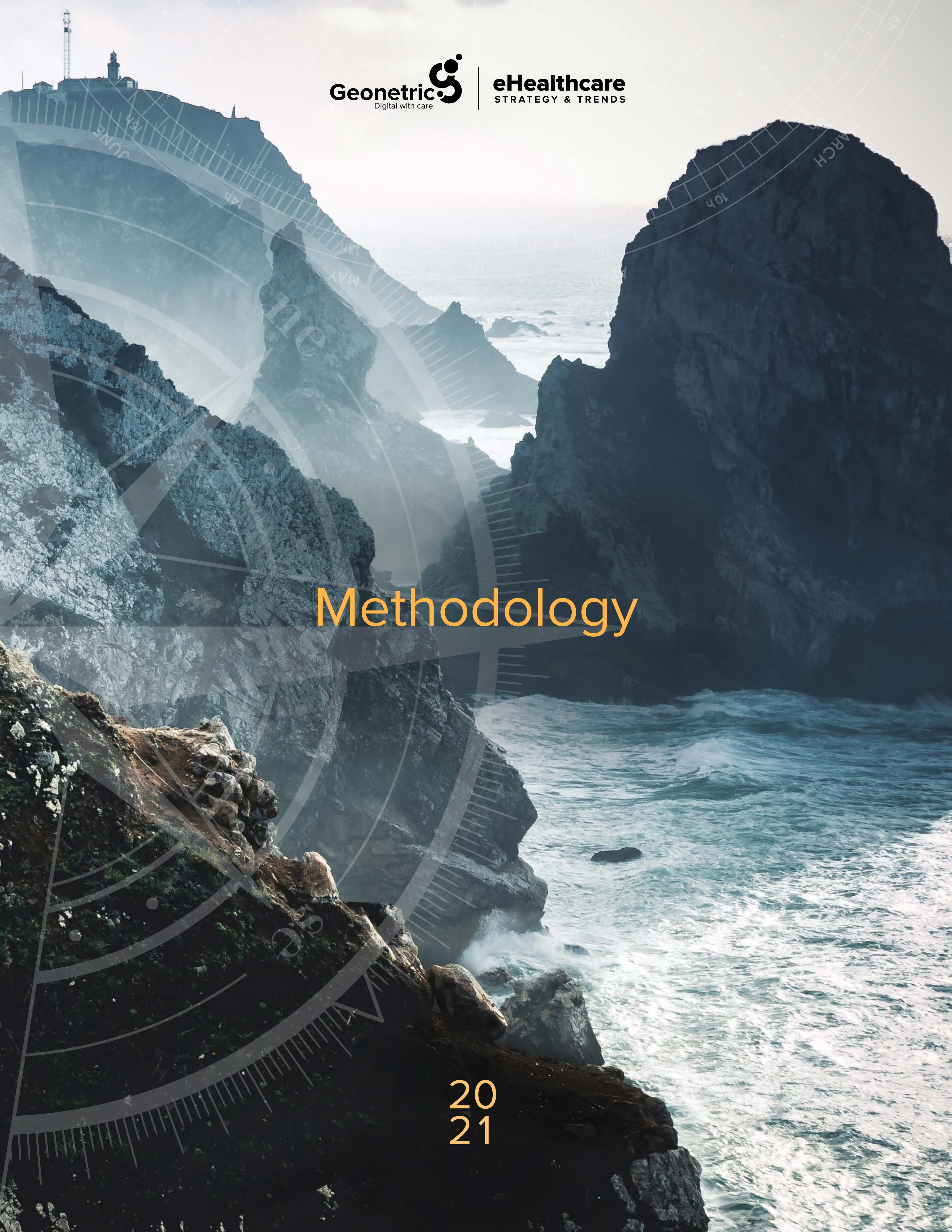

Methodology

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Data Collection and Demographics

Data collection was handled through an online survey. Respondents were solicited through a wide range of channels including email, social media and phone. Geonetric partnered with *eHealthcare Strategy & Trends* for additional promotion efforts. All survey questions were optional and some respondents chose not to answer individual questions. Peer groups for segmentation were largely self-reported. Data is provided as is and represents only the input and opinions of those organizations that responded. It is offered without any promises as to its representation of the broader industry or statistical significance. 83 healthcare provider organizations and 23 vendors/agencies completed this year's survey.

Response Type	
We provide medical services (hospital, healthcare system, clinic, academic medical center, etc.)	83
We are an agency/vendor/consultant/solutions provider to organizations who provide medical services.	23
Total	106

Organization Type	
Health system	55
Hospital	14
Academic medical center	6
Other-please specify	5
Clinic/clinic group/physician group	2
Children's Hospital	1
Total	83

Average Inpatient Beds (Including Bassinets)	
Leader	945.71
Average	568.03
Laggard	254.57
Overall	608.58

Average Number of Employees	
Leader	11,698.71
Average	6,418.97
Laggard	5,300.87
Overall	7,890.25

Average Number of Employed Physicians	
Leader	680.61
Average	436.00
Laggard	272.52
Overall	473.22

Our Services

Digital Strategy

- Web strategy
- Persona development
- Journey mapping
- Physician marketing
- Service-line marketing
- Google Analytics
- Google Tag Manager
- Dashboard creation and management
- Digital front door

User Experience & Design

- Accessibility
- User experience research
- User experience strategy
- Information architecture
- Web design
- Intranet design
- Landing page design
- Personalization strategy

Content Management Systems

- CMS platform selection
- VitalSite®
- Drupal
- Sitecore
- Provider directory

Content Services

- Content strategy
- Content development and copywriting
- Content marketing
- Tone and voice
- Content governance
- In-person and virtual training

Search Engine Optimization

- Technical SEO
- On-page SEO
- Keyword research
- Business listing management

Digital Advertising

- Pay-per-click
- Display ads
- Social media marketing
- Campaign tracking

Google Partner

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Geonetric ensures top healthcare brands deliver digital with care. As a digital experience agency with deep technical and creative expertise, Geonetric provides hospitals, health systems and medical groups user experience consulting, web design, hosting and creative digital services optimized for the unique needs of the healthcare industry. Geonetric offers its own popular healthcare-specific content management system, VitalSite, as well as creates compelling experiences on Sitecore, Drupal and other web content management platforms.

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